

**Iowa Department on Aging**

**Title IIIB Legal Assistance Program**

**Activity Report**  
**for**  
**SFY 2011**

Prepared from data submitted by legal providers and  
Area Agencies on Aging

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## Introduction

The legal needs of older Iowans are very real and often entwined with other issues that first come to the attention of the aging network. Legal assistance issues are present when questions arise over shelter, adequate food, services, public benefits, and independence. The legal concerns can come in the form of landlord/tenant frustrations, housing violations, advance directives, guardianship, mental health commitment, wills, resident's rights, individual's rights, appeals for Medicaid or Medicare, protection from elder abuse, pursuit of consumer fraud and scams and age discrimination. The aging network legal providers, funded in part by the Older Americans Act dollars, respond to these types of issues and are a valuable resource to those older Iowans who find themselves in situations where legal advice or assistance is needed.

Under the Older Americans Act (OAA), the term legal assistance means legal advice and representation provided by an attorney to older individuals with economic or social needs and includes...counseling or other appropriate assistance. Paralegals or legal assistants under the direct supervision of licensed attorneys can also provide assistance. Legal assistance has been a priority service since 1975 when they were first created under the OAA. The 2000 amendments retained legal assistance as one of the three categories of priority services under Title III, Part B, Supportive Services. Priority services must be funded by each Area Agency on Aging in an adequate proportion. Iowa determined that the minimum adequate proportion is 3%.

The Iowa Title IIIB Legal Assistance Program serves persons 60 years of age and older by providing legal advice and representation, information and education and referrals in civil legal matters throughout the state. The role of this program is to identify and serve the legal needs of those older people who are most vulnerable due to social and/or economic circumstances, particularly those who are frail, isolated and/or minorities.

Another piece of the legal assistance program is found in Title III and VII of the OAA. Under Title III, each state is required to assign personnel (one of which is to be known as legal services/assistance developer) to provide state leadership in developing legal assistance programs for older individuals

throughout the state. (OAA §307(a) (13)). Iowa's Legal Services/Assistance Developer is Deanna Clingan-Fischer, JD.

In Title VII, each state must provide a State Legal Services/Assistance Developer and the services of other personnel sufficient to ensure:

1. Leadership in securing and maintaining legal rights of older individuals;
2. Coordination of the provision of legal assistance;
3. Provision of technical assistance, training, and other supportive functions to area agencies on aging, legal assistance providers, ombudsman, and other persons as appropriate;
4. Promotion of financial management services for older individuals at risk of conservatorship;
5. Assistance to older individuals in understanding their rights, exercising choices, benefiting from services and opportunities and maintaining the rights of older individuals at risk of guardianship; and
6. Improvement of the quality and quantity of legal services provided to older individuals

In an effort to highlight the work of the Older Americans Act Title IIIB legal assistance network in Iowa, the Department on Aging began collecting data from Area Agencies on Aging and the legal providers. This report provides a summary of Units of service, Clients served, Client demographics by minority, economic need, social need and age, Types of cases handled, Level of service provided to each client, Community education presentations, Emerging issues, Unmet needs and Outcomes-case summaries.

## LEGAL SERVICES FUNDED UNDER TITLE IIIB OF THE OLDER AMERICANS ACT



### **Area 1 & 8**

Iowa Legal Aid  
799 Main Street, Suite 280  
Dubuque, Iowa 52001  
(563) 588-4653 or  
1-800-942-4619

### **Area 2, 5 & 12**

Iowa Legal Aid  
600 1st St., NW, Suite 103  
Mason City, Iowa 50401  
(641) 423-4651 or  
1-800-392-0021

### **Area 3 & 4**

Iowa Legal Aid  
520 Nebraska Street  
Suite 337  
Sioux City, Iowa 51101  
(712) 277-8686 or  
1-800-352-0017

### **Area 6 & 7**

Iowa Legal Aid  
607 Sycamore Street  
Suite 708  
Waterloo, Iowa 50704  
(319) 235-7008 or  
1-800-772-0039

### **Area 9**

H.E.L.P. Legal Assistance  
736 Federal Street  
Suite 401  
Davenport, Iowa 52803  
(563) 322-6216

### **Area 10**

Martha Quint  
Attorney at Law  
118 3<sup>rd</sup> Avenue, SE  
Cedar Rapids, Iowa 52401  
(319) 366-7675

### **Area 11 & 14**

Iowa Legal Aid  
1111 9th Street, Suite 230  
Des Moines, Iowa 50314  
(515) 280-3636 or  
1-800-532-1503

### **Area 13**

Iowa Legal Aid  
532 1st Avenue, Suite 300  
Council Bluffs, Iowa 51503  
(712) 328-3982 or  
1-800-432-9229

### **Area 15**

Iowa Legal Aid  
112 East 3rd Street  
Ottumwa, Iowa 52501  
(641) 683-3166 or  
1-800-452-0007

### **Area 16**

Iowa Legal Aid  
1700 1<sup>st</sup> Ave, Ste 10  
Iowa City, Iowa 52240  
(319) 351-6570 or  
1-800-272-0008

## IOWA AREA AGENCIES ON AGING (AAA) NETWORK



### Area 1

Northland AAA  
808 River Street  
Decorah, Iowa 52101  
(563) 382-2941 or  
1-800-233-4603

### Area 2, 5 & 12

Elderbridge AAA  
22 N. Georgia, Suite 216  
Mason City, Iowa 50401  
(641) 424-0678 or  
1-800-243-0678

### Area 3

Northwest Aging Assoc.  
714 10<sup>th</sup> Avenue East  
Spencer, Iowa 51301  
(712) 262-1775 or  
1-800-242-5033

### Area 4

Siouxland Aging Services,  
Inc.  
2301 Pierce Street  
Sioux City, Iowa 51104  
(712) 279-6900 or  
1-800-798-6916

### Area 6 & 7

Hawkeye Valley AAA  
2101 Kimball Avenue,  
Suite 320  
Waterloo, Iowa 50702  
(319) 272-2244 or  
1-800-779-8707

### Area 8

Scenic Valley AAA  
2728 Asbury Road  
Dubuque, Iowa 52001  
(563) 588-3970

### Area 9

Generations AAA  
935 E. 53<sup>rd</sup> Street  
Davenport, Iowa 52807  
(563) 324-9085 or  
1-800-892-9085

### Area 10

The Heritage Agency  
6301 Kirkwood Blvd SW  
PO Box 2068  
Cedar Rapids, Iowa 52406  
(319) 398-5559 or  
1-800-332-5934

### Area 11

Aging Resources of Central  
Iowa  
5835 Grand Ave,  
Suite 106  
Des Moines, Iowa 50312  
(515) 255-1310 or  
1-800-747-5352

### Area 13

Southwest 8 Senior Services,  
Inc.  
300 W. Broadway,  
Suite 240  
Council Bluffs, Iowa 51503  
(712) 328-2540 or  
1-800-432-9209

### Area 14

Area XIV AAA  
215 E. Montgomery  
Creston, Iowa 50801  
(641) 782-4040

### Area 15

Seneca AAA  
117 N. Cooper Street, Suite 2  
Ottumwa, Iowa 52501  
(641) 682-2270 or  
1-800-642-6522

### Area 16

Southeast Iowa AAA, Inc.  
509 Jefferson Street  
Burlington, Iowa 52601  
(319) 752-5433 or  
1-800-292-1268

# **Title IIIB Legal Services Report for SFY 2011**

## **SUMMARY**

### **I. Source and Type of Information Provided**

This report is a summary of the activities and accomplishments of the Title IIIB legal services providers serving Iowans age 60 and older during State Fiscal Year (SFY) 2011. (July 1, 2010 to June 30, 2011). The data the report is based upon was obtained from quarterly reports submitted by the state's Title IIIB legal services providers. These reports were submitted to the Iowa Department on Aging and to the Area Agency on Aging (AAA) with whom each provider has contracted. The quarterly reports provided information relative to: 1) units of service and clients served; 2) client demographics; 3) types of cases handled; 4) the level of service provided to each client; 5) community education presentations; 6) emerging issues and unmet need and 7) outcome reporting—case summaries.

### **II. Providers of Service**

There are 10 Title IIIB legal services providers contracted with by Iowa's 13 Area Agencies on Aging in SFY '11. These providers made services available in all 16 planning and service areas and all 99 counties. The Legal Service Providers include Iowa Legal Aid regional offices (8), a Private Attorney, Martha L. Quint (1), The Senior Citizens Law Project of HELP Legal Assistance (1).

### **III. Units of Service, Clients and Total Cases**

The Title IIIB legal assistance programs served 3,330 clients while providing 5,834 hours of service. Services provided include: counsel and advice, brief service, referrals, settled with litigation, court decisions, settled without litigation, administrative decision and other.



On the Legal Assistance Standardized Reporting form, the categories for reporting legal cases handled are:

Consumer/Finance	Housing
Employment	Income Maintenance
Family	Individual Rights
Health	Miscellaneous

In SFY 2011, the four (4) primary case types handled statewide were:

Medicaid	18%
Powers of Attorney	13%
Collection	12%
Wills/Estates	10%

Medicaid, Collection, Powers of Attorney and Wills/Estates represent 53% of the types of cases brought to the attention of the legal providers. A complete listing of individual case types by number of clients and as a percentage of the total clients is included in this report on page 19. (Figure 4)

65% (or 2,159) of cases were handled with counsel and advice, while another 22% (or 717) cases were handled with brief service. See Figure 6 entitled “Cases by Type and Level of Service” on pages 21-22 for a complete listing.

#### **IV. Community Education**

A total of 114 sessions were presented through community education efforts and a total of 1,220 individuals were served. Topics discussed at the community education forums were: grandparents visitation rights, health care reform affecting seniors, credit card offers, mortgage foreclosures, funeral law, retirement planning, advance directives including durable powers of attorney for health care and living wills, financial powers of attorney, elder abuse, consumer rights, Medicaid eligibility for nursing home care, probate, tax of social security benefits, medical debt, hearing aid dealers and complaints, wills, caregiving legal issues, and general elder law.

## V. Minority Groups Served

Of the total clients receiving legal assistance through the Title IIIB program, 297 were minorities. This represents 9% of all clients served. The breakdown by minority group is as follows:

American Indian/Alaskan Native:	18
Asian/Pacific Islander:	14
Black/African American:	200
Native Hawaiian	3
Hispanic:	52
Other:	10

## VI. Economically and Socially Needy

In SFY 2011, 30%, or 1,002 of all older Iowan's receiving legal assistance were in greatest economic need. This means that the need resulted from having an income level at or below the poverty level. The reports also showed that 38%, or 1,258 of all older Iowan's receiving legal assistance were considered to be in greatest social need. This means that the need was caused by non-economic factors which include physical and mental disabilities, language barriers, and cultural, social or geographical isolation caused by racial or ethnic status, that either: (i) restricts the ability of the individual to perform normal daily tasks; or (ii) threatens the capacity of the individual to live independently.

## VII. Age Groups Served

The figures below show the breakdown of older Iowan's served by the Title IIIB Legal Assistance Program and the number of hours of service received by those Iowans.

<u>Age Group</u>	<u>Legal Assistance Received</u>
60-74	2,156
75+	1,174
Hours of service	5,834

## VIII. Unmet Need for Legal Assistance

The Unmet Needs Report data is reported to the Iowa Department on Aging from the Area Agencies on Aging through an unmet needs reporting system. These numbers account for only those elderly Iowans that have come in contact with the Area Agencies on Aging (AAA) and service providers and not all elderly Iowans within the aging network.

The other category of unmet need is reported by the Title IIIB legal providers on their quarterly report forms to the AAA's and the Department on Aging. These reports reflect the number of older Iowans that contacted the legal provider for legal assistance.

### **As Identified by the Unmet Needs Report**

46 clients  
needing 136 hours of assistance

### **As Identified by Title IIIB Legal Providers**

496 clients  
needing 1,710 hours of assistance

Both the legal assistance and unmet need reports request information to determine the extent of the need for legal assistance. Both reports reflect an unmet need for legal assistance. The reason identified for the unmet need: the funding resource is inadequate to cover the entire need. The Unmet Need report figures highlight that 46 older Iowans had legal assistance needs which would have totaled 136 hours of service that were not met. The Title IIIB legal providers reported that 496 clients were in need of legal assistance which would have resulted in 1,710 hours of assistance. The total from both reports reflect that of the individuals that came into contact with the aging network and its providers, 542 clients had legal needs that could not be addressed by the current resources due to inadequate funding resources. These 542 individuals needed 1,846 hours of legal assistance service.

## IX. Emerging Issues

The Title IIIB legal providers identified many emerging issues within the older Iowan population where assistance is needed: Financial abuse by family and friends of frail elderly, Undue influence into making gifts, Consumer debt and credit card issues, Length of processing of Medicaid applications, Reduction in elder waiver providers to serve persons 60 and older, Medicaid eligibility concerns relating to military pensions and divorce, Lack of substitute decision making resources, Consumer Directed Attendant Care (CDAC) providers with conflicts of interest; Social Security disability and inheritance guidelines, and Lack of guidance for guardians which results in over extending authority.

## **X. Outcomes—Case Summaries**

Listed below are actual case summaries provided by the legal providers showing how Title IIIB legal assistance programs have helped older Iowans. As evident from the case stories listed below, older Iowans were provided with legal assistance and information that allowed them to prevent problems or resolve their legal issues.

The legal providers also distribute various self-help booklets and make appropriate referrals.

- Mrs. E was the trustee of a Medicaid Miller Trust for her husband, who was in a care facility. The husband died and Mrs. E contacted the legal provider to see how to proceed as she had received a questionnaire from Medicaid Estate Recovery. While the husband was in the facility, the wife had not paid the client participation for care from the trust as she did not understand this was her role and because she had not received a bill from the facility. Three days before the husband passed away, the facility sent a bill to Mrs. E showing that \$10,000 was owed. Mrs. E worked with the legal provider to respond to the Medicaid estate recovery questionnaire and to arrange for payment to the facility. Because of the legal provider's involvement and assistance, Mrs. E did not have to attempt to pay the bill from her meager income and resources and was able to stay in her home.
- Mr. B purchased a new car by shopping on line and then working with a local dealer that is part of a large chain. After paying for the car, Mr. B was told that he owed more money and the dealership refused to send the necessary paperwork to the county treasurer so he could get his license plates. Mr. B contacted the legal provider and requested assistance. The legal provider reviewed the contract and sales papers and then wrote a letter to the dealership. After reviewing the letter, the dealership acknowledged their error and sent the papers to the treasurer so Mr. B could obtain his car licenses.
- A 69-year-old woman contacted the legal provider after being denied subsidized senior housing due to a bad credit report. The woman's only source of income was from Supplemental Security Income and she was temporarily living with a friend. The woman had lived with her daughter for years and the daughter used mom's credit without permission. With the assistance of the legal provider, the woman was able to represent herself in a housing appeal, in which she obtained a reversal of the decision that denied her application for subsidized housing based on bad credit.

- An 82-year-old woman's daughter contacted the legal provider after a nursing home filed suit against both the woman (resident) and her daughter for unpaid nursing home fees. The woman's daughter was attorney-in-fact under a power of attorney for her mother and had signed some papers as the agent. The nursing home was billing the resident and her daughter for \$27,000. The legal provider represented the resident and settled the dispute with the nursing home accepting \$15,000 in Veterans Benefits. The Department of Human Services agreed to allow the nursing home to take the remaining balance from the resident's income as an unmet medical need over a seven month period.
- The legal provider was contacted by a disabled older woman whose sole source of income was Social Security. Over \$200 per month was being garnished by the Internal Revenue Service for a debt owed by her ex-husband. The debt was from a previous tax year before the divorce. With assistance of the legal provider, the garnishment was stopped so that the woman had funds to meet her own basic needs.
- A 74-year-old man contacted the legal provider for help in evicting his son from his home after living with him for five years. The man's son had a job, but had not paid rent or helped with any of the expenses. The son abused drugs and alcohol and had become physically abusive to the father for more than a year. The legal provider assisted the man to obtain a court order to remove his son from the home.
- A 75-year-old man contacted the legal provider after his former landlord refused to refund his full deposit. The apartment manager called the man and told him he would only return a small portion of the deposit. The landlord verbally told the man that the portion of the deposit withheld was for cleaning and painting. The legal provider wrote a letter to the man's former landlord requesting the return of the full deposit since the man had lived in the apartment for seven years, and the cost of cleaning and painting was considered ordinary wear and tear. The legal provider also advised the landlord that the man did not receive a written notification explaining the withholding of the man's deposit within the 30 day requirement. Due to the legal provider's assistance, the landlord refunded the full amount of the deposit.
- A 74-year-old woman contacted the legal provider after being denied electrical service. There was a \$400 unpaid electric bill which was fraudulently acquired by her daughter. The legal provider called the electric company and they agreed to allow the woman service if she personally came in and applied for new service and signed an affidavit stating that the \$400 bill was not her bill. The electric company admitted that the bill was uncollectable and service could not be

denied. With the assistance of the legal provider, the woman was able to get electric service to make a move away from her abusive daughter.

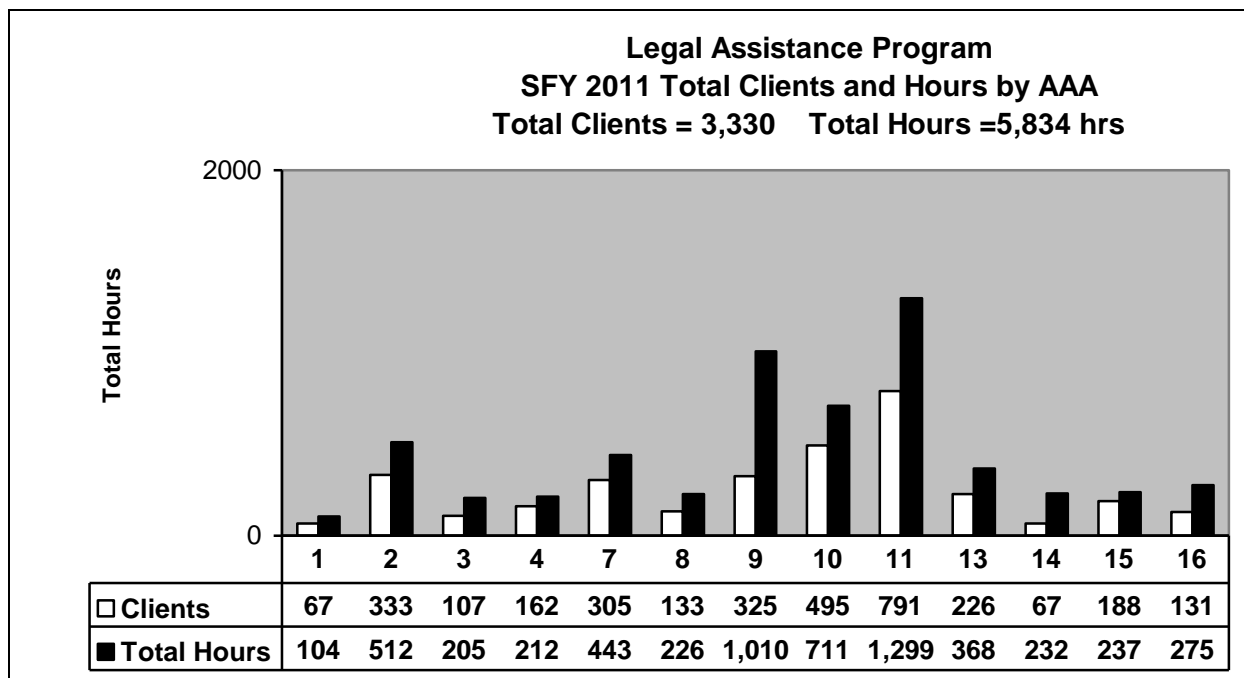
- A 71-year-old woman contacted the legal provider after her husband's headstone was removed from his grave. The woman had not paid the \$72 city fee for the headstone and the city requested the headstone be removed. The woman then paid the fee to the city, but the monument company had not replaced the headstone. The legal provider contacted the monument company and the headstone was replaced.
- An older woman who was gravely ill contacted the legal provider for assistance in revocation of a will. Her present will did not conform to her wishes and the situation was presented as an emergency. Due to the need to have the matter taken care of quickly, the legal provider drafted a written revocation document and took it to the hospital where the woman signed it. The original and copies of that document were left with the woman and her family. The woman passed away a short time later. As a result of the legal provider's assistance, her property passed pursuant to Iowa law to the persons to whom she wanted the property to go to and she died with the peace of mind that this had been accomplished.
- Mrs. C is disabled and received Social Security Disability and Supplemental Security Income (SSI). Her mother died in November, 2010 and named all her children as beneficiaries under her will. Mrs. C reported the inheritance to the Social Security Administration (SSA) and they in turn stopped the SSI payment. SSA paid Mrs. C from November 2010 to April 2011, however. The SSA determined that Mrs. C was overpaid by \$3000 and that she must repay this amount. The waiver of overpayment was denied since Social Security attributes all the money in the estate to Mrs. C even though she does not know how much she will receive or when it will be distributed. The only asset is a small home in a rural area that may or may not sell. There is no possibility of receiving the distribution until the estate is closed. Mrs. C no longer receives SSI, is having \$10 per month deducted for repayment, and is now receiving only \$210 per month to live on. She has to borrow money from her children in order to live. The legal provider is working with Social Security, the local public benefits system, and the courts to ensure that Mrs. C has her basic needs met and that the estate is administered in a prompt fashion.
- The legal provider was contacted by an 81-year-old woman after her husband took their vehicle in for repairs and returned home with a different car. The husband had the beginning stages of Alzheimer's disease and thought the vehicle was a temporary loan vehicle. When the wife tried to return the car to the

dealership, she was informed that their trade-in car was sold. With the assistance of the legal provider, the woman was able to re-negotiate the loan at a better interest rate, reducing the payments to the same amount as their previous loan.

- An 84-year-old woman contacted the legal provider after the woman and her husband were notified that they were being evicted from the nursing home for non-payment. The woman and her husband both had strokes, and could no longer handle their finances. The couple believed that their children were using their funds inappropriately and wanted to revoke their power of attorney. With the assistance of the legal provider, the nursing home agreed to dismiss the eviction. The nursing home became the representative payee and received direct payments from the Social Security Administration. The powers of attorney were revoked.
- An 81-year-old woman contacted the legal provider for assistance after being threatened with an eviction from her apartment. The woman requested a first floor apartment and agreed to pay \$1,300 per month for the first year and \$1,859 the second year. The landlord installed new carpet and the smell of the glue made the woman ill. The woman was moved to a third floor apartment. The landlord approached the woman with a lease that stated her rent was \$1,859 per month. The manager stated that the difference would be paid by her veteran's pension. The woman refused to sign up for the veteran's pension, because she was not eligible for widow's benefit until she was below the \$80,000 asset limit. The landlord continued to charge the woman \$1,850 per month. The landlord approached her after several months and stated she owed between \$3,500 and \$3,800 in back rent. The woman was told she would have to sign up for the veteran's pension or she would be evicted. With the assistance of the legal provider, the woman was able to renegotiate the lease to \$1,600 per month as long as she was in the apartment, with one month free.
- The legal provider was contacted by a 60-year-old woman when she received notice that she would lose her elderly waiver services. The woman had a brain tumor removed three years before and had issues with her memory. The woman also suffered from sleep apnea, seizures, arthritis in her knee, cramps in her arms, and limited use of her right hand due to strokes. The legal provider obtained a letter from the woman's doctor stating her various disabilities and impairments, that her condition had not improved over the last year, and that she would benefit from continued elderly waiver services. The legal provider represented the woman in a hearing and the Administrative Law Judge ruled in her favor to resume services.

## STATE TOTALS FOR THE LEGAL ASSISTANCE PROGRAM

**Figure 1: Clients and Hours by AAA**

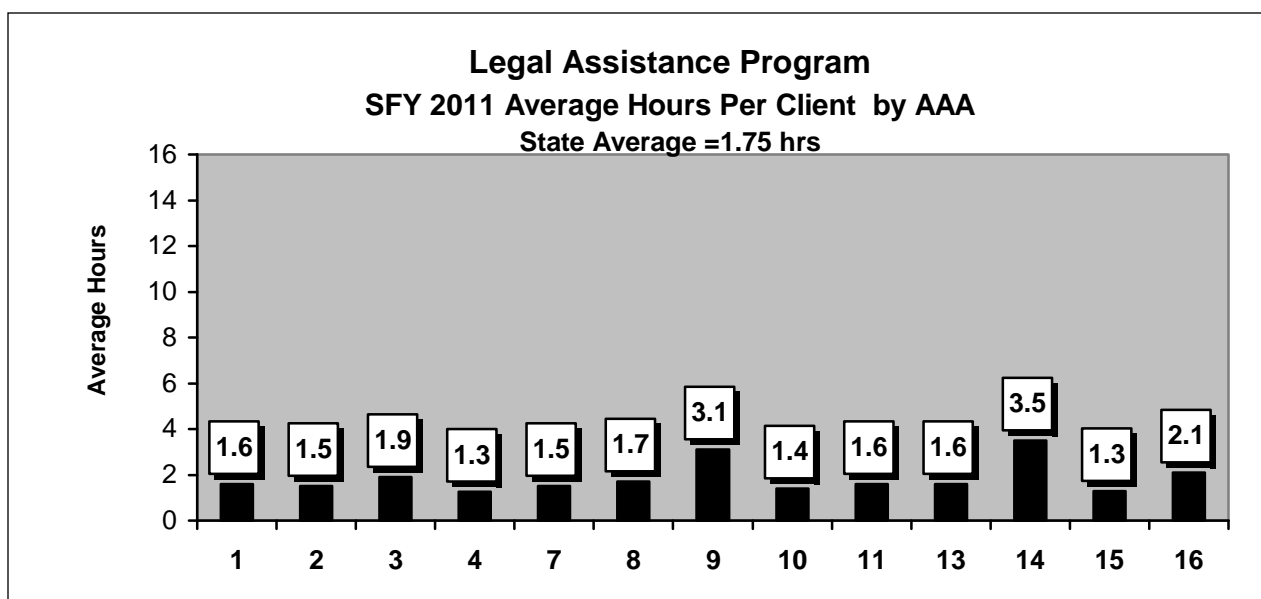


**Key:**

### Area Agencies on Aging

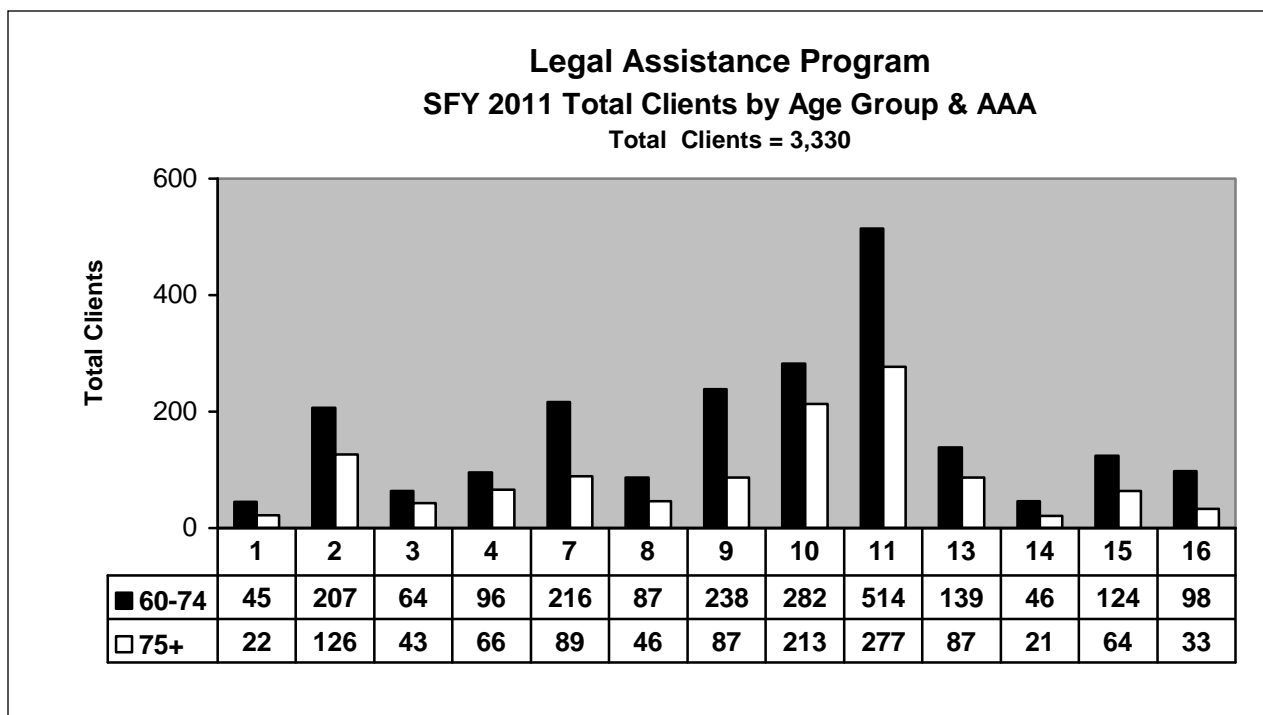
- |                               |                                    |
|-------------------------------|------------------------------------|
| 1 Northland                   | 10 Heritage                        |
| 2 Elderbridge                 | 11 Aging Resources of Central Iowa |
| 3 Northwest Aging Association | 13 Southwest 8 Senior Services     |
| 4 Siouxland                   | 14 Area XIV                        |
| 7 Hawkeye Valley              | 15 Seneca                          |
| 8 Scenic Valley               | 16 Southeast Iowa                  |
| 9 Generations                 |                                    |



**Figure 2: Average Hours per Client by AAA****Key:**

Area Agencies on Aging	
1 Northland	10 Heritage
2 Elderbridge	11 Aging Resources of Central Iowa
3 Northwest Aging Association	13 Southwest 8 Senior Services
4 Siouxland	14 Area XIV
7 Hawkeye Valley	15 Seneca
8 Scenic Valley	16 Southeast Iowa
9 Generations	

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9 Generations	

**Figure 3: Clients Served by Age Group and AAA**

Note: 65% of Clients were in the 60-74 age group  
 35% of Clients were in the 75+ age group

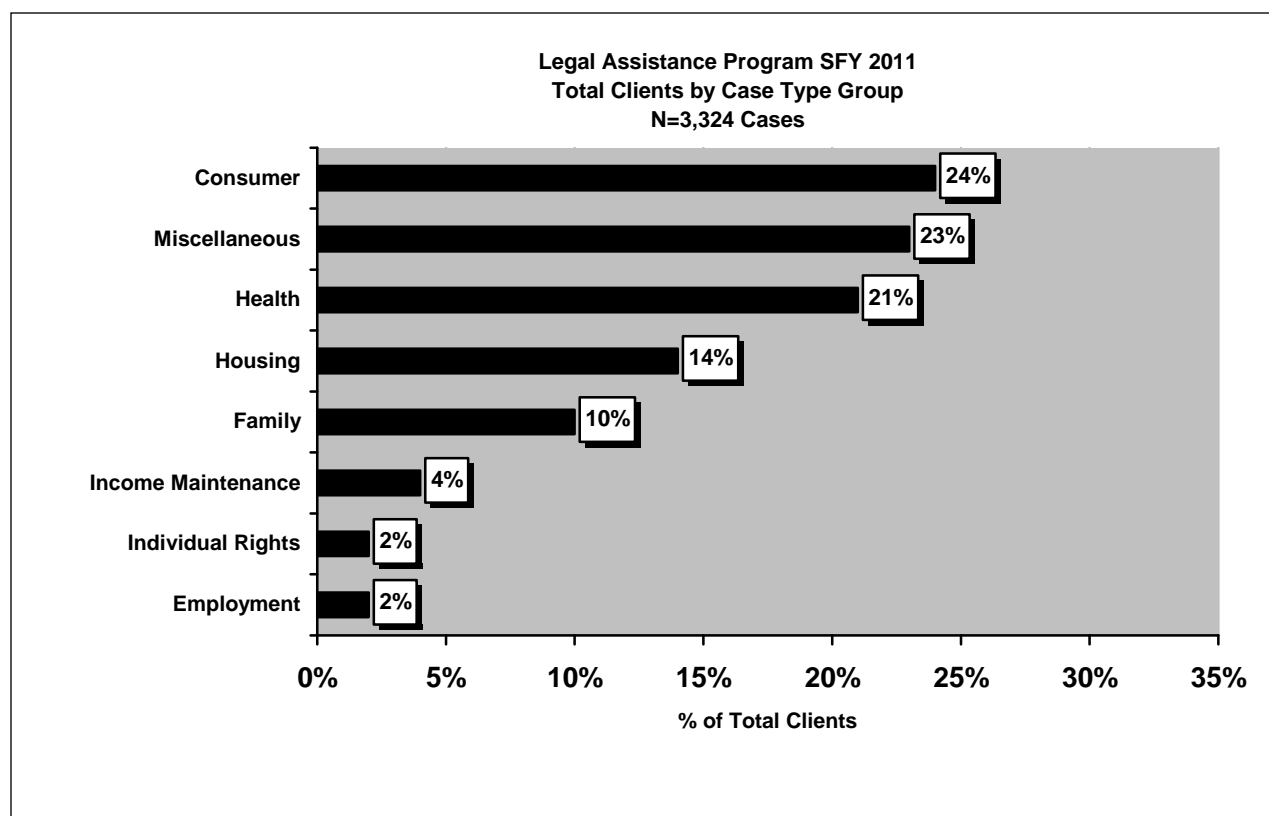
**Key:**

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2 Elderbridge	11 Aging Resources of Central Iowa
3 Northwest Aging Association	13 Southwest 8 Senior Services
4 Siouxland	14 Area XIV
7 Hawkeye Valley	15 Seneca
8 Scenic Valley	16 Southeast Iowa
9 Generations	

**Figure 4: Individual Case Types by Number of Clients  
and as a Percentage of the Total Clients**

<b>Legal Assistance Program</b> <b>Individual Case Types by Number of Clients and as a Percentage</b> <b>of the Total Clients</b>  <b>N= 3,324 Cases</b>					
<b>Case Type</b>	<b>Total Clients</b>	<b>%</b>	<b>Case Type</b>	<b>Total Clients</b>	<b>%</b>
Medicaid	606	18%	Taxes	26	1%
Collection	397	12%	LTC Facilities	22	1%
Power of Attorney	341	10%	SSI	21	1%
Wills/Estates	332	10%	Social Security	21	1%
Landlord/tenant	189	6%	Other (Health)	20	1%
Bankruptcy	136	4%	Support	18	1%
Homeowners	111	3%	Other (Employment)	16	1%
Contracts	107	3%	Private Insurance	14	1%
Other (Misc)	97	3%	Visitation	13	0%
Guardianship	94	3%	Utilities	13	0%
Abuse	88	3%	Unfair Sales	12	0%
Credit	78	2%	License	12	0%
Divorce	65	2%	Mental Health	10	0%
Foreclosure	64	2%	Public Housing	10	0%
Rights	58	2%	Home Care	7	0%
Other (Consumer)	44	1%	Wage Claims	6	0%
Other (Family)	39	1%	Food Stamps	6	0%
Other (Rights)	32	1%	Discrimination	6	0%
Unemployment	31	1%	Name Change	6	0%
Medicare	30	1%	Civil Rights	6	0%
Other (Housing)	29	1%	Disability	3	0%
Other (Income)	28	1%	Pred. Lending	2	0%
Veterans Benefits	28	1%	State & Local	2	0%
Loans	27	1%	Indian/Tribal	1	0%

**Figure 5: Clients by Case Type Group**



**Key:** The categories above include the following types of cases.

**Consumer Finance**

Bankruptcy/Debtor relief, Collection, Contracts, Credit access, Predatory lending, Loans/Installment purchases, Public utilities and Unfair sales practices

**Miscellaneous**

Indian/Tribal, Licenses, Wills/Estates, Power of Attorney

**Health**

Medicaid, Medicare, Home Care, Private Insurance and Long-Term Care Facilities,

**Housing**

Housing rights—evictions/rent disputes, Foreclosures, Home ownership, Landlord/Tenant, Public housing

**Family**

Grandparent custody/visitation, Divorce, Guardianship/Conservatorship, Name change, Elder abuse and Exploitation and Support

**Income Maintenance**

Social Security, Food stamps, SSI, State & Local income issues such as general relief, Unemployment, and Veterans benefits

**Individual Rights**

Immigration/Naturalization, Mental health, Physically disabled rights, Civil Rights, Long-term care resident's rights and Tenants rights

**Employment**

Discrimination, Taxes and Wage claims

**Figure 6: Cases by Type and Level of Service**

Case Group	Case Type	1	2	3	4	5	6	7	8	9	10	Total
Miscellaneous	Indian/Tribal	1										1
	License	8	2		1						1	12
	Other (Misc)	64	25		1						7	97
	POA	134	130		1						76	341
	Wills/estates	199	85		1						47	332
Miscellaneous Total		406	242	0	4	0	0	0	0	0	131	<b>783</b>
Consumer Finance	Bankruptcy	119	11	1		3				1	1	136
	Collection	250	106	1			2	6		13	19	397
	Contracts	94	7				1			1	4	107
	Credit	60	14								4	78
	Loans	18	8								1	27
	Other (Consumer)	39	3								2	44
	Pred. Lending	2										2
	Unfair sales	9	3									12
	Utilities	7	6									13
Consumer Finance Total		598	158	2	0	3	3	6	0	15	31	<b>816</b>
Health	Home Care	4	1								2	7
	LTC Facilities	14	3	3						1	1	22
	Medicaid	383	147	5	2				8	1	60	606
	Medicare	20	4								6	30
	Other (Health)	15	1								4	20
	Private Insurance	12	2									14
Health Total		448	158	8	2	0	0	0	8	2	73	<b>699</b>
Individual Rights	Civil Rights	5						1				6
	Disability	3										3
	Mental Health	9	1									10
	Other (Rights)	25	2								5	32
Individual Rights Total		42	3	0	0	0	0	1	0	0	5	<b>51</b>
Housing	Foreclosure	47	7					1			9	64
	Homeowners	93	5	2					2		9	111
	Landlord/ten	154	23		1		2	2	1	3	3	189
	Other (Housing)	24	5									29
	Public Housing	9	1									10
	Rights	40	12						2		4	58
Housing Total		367	53	2	1	0	2	3	5	3	25	<b>461</b>
Income Maintenance	Food stamps	6										6
	Other (Income)	15	4								9	28
	Social Security	12	4								5	21
	SSI	9	2						4		6	21
	State & Local	2										2
	Unemployment	22	3	1					5			31
	Veterans Benefits	13	11	4								28
		79	24	5	0	0	0	0	9	0	20	<b>137</b>

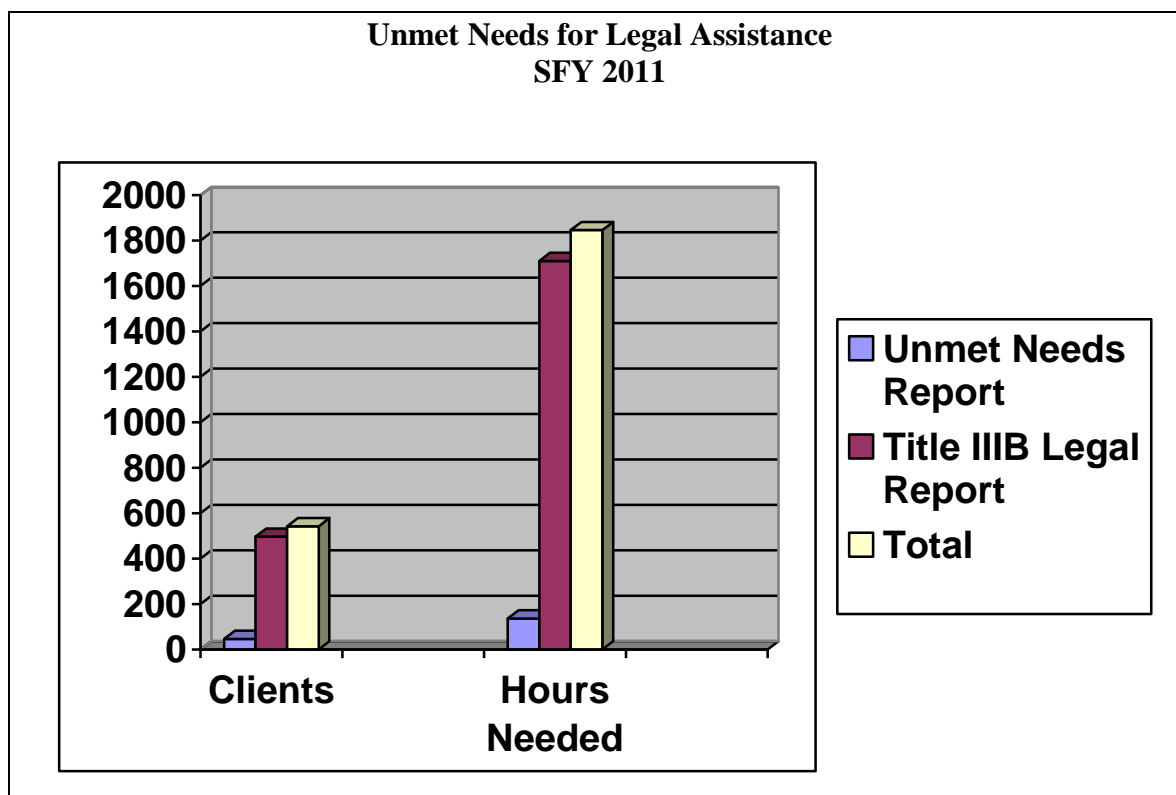
1	Counsel and Advice	3	Referred	5	Client Withdrew	7	Settled with Litigation	9	Court Decision
2	Brief Service	4	Insufficient Merit	6	Settled without Litigation	8	Administrative Decision	10	Other

**Figure 6: Cases by Type and Level of Service**

Case Group	Case Type	1	2	3	4	5	6	7	8	9	10	Total
Family	Abuse	23	35	9				1		2	18	88
	Divorce	51	6	3							5	65
	Guardianship	58	19	1				1		4	11	94
	Name change	6										6
	Other (Family)	24	4	2				1			8	39
	Support	15	1								2	18
	Visitation	11									2	13
Family Total		188	65	15	0	0	0	3	0	6	46	<b>323</b>
Employment	Discrimination	5									1	6
	Other (Employment)	1	13	1							1	16
	Taxes	21	1	1					1		2	26
	Wage Claims	4		2								6
Employment Total		31	14	4	0	0	0	0	1	0	4	<b>54</b>
Grand Total		2159	717	36	7	3	5	13	23	26	335	<b>3324</b>

1	Counsel and Advice	3	Referred	5	Client Withdrew	7	Settled with Litigation	9	Court Decision
2	Brief Service	4	Insufficient Merit	6	Settled without Litigation	8	Administrative Decision	10	Other

**Figure 7: Unmet Need for the Legal Assistance Program  
As Identified through the  
Unmet Needs Report and the Title IIIB Legal Assistance Report**



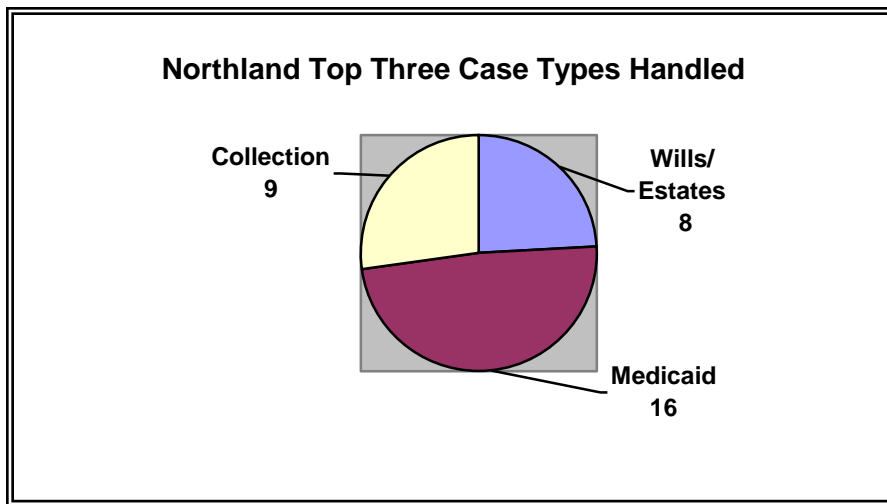
## TOTALS BY AREA AGENCY ON AGING SFY 2011

One unit of service = 1 hour

### Northland Agency on Aging

Units of Service 104

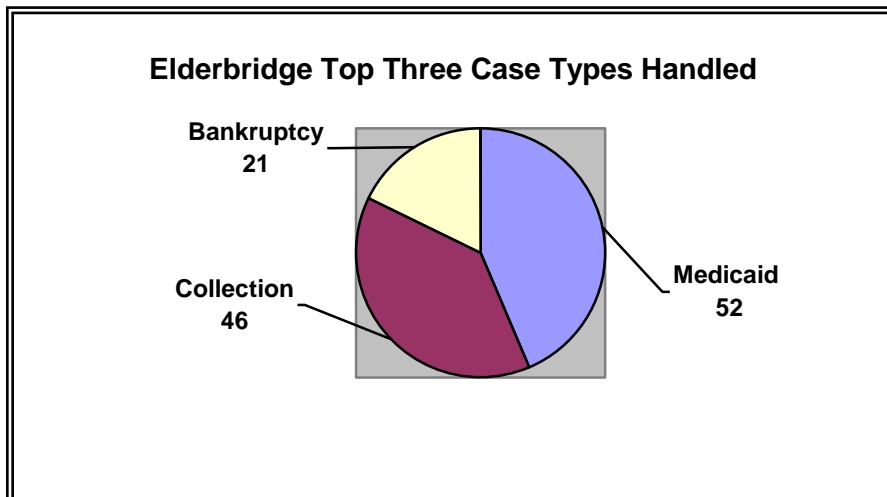
Unduplicated Clients Served 67



### Elderbridge Agency on Aging

Units of Service 512

Unduplicated Clients Served 333

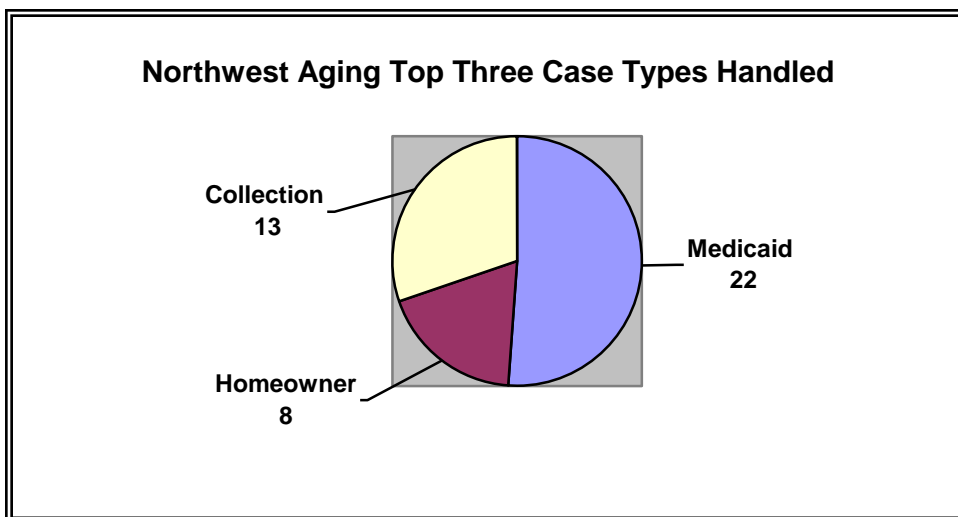




**Northwest Aging Association**

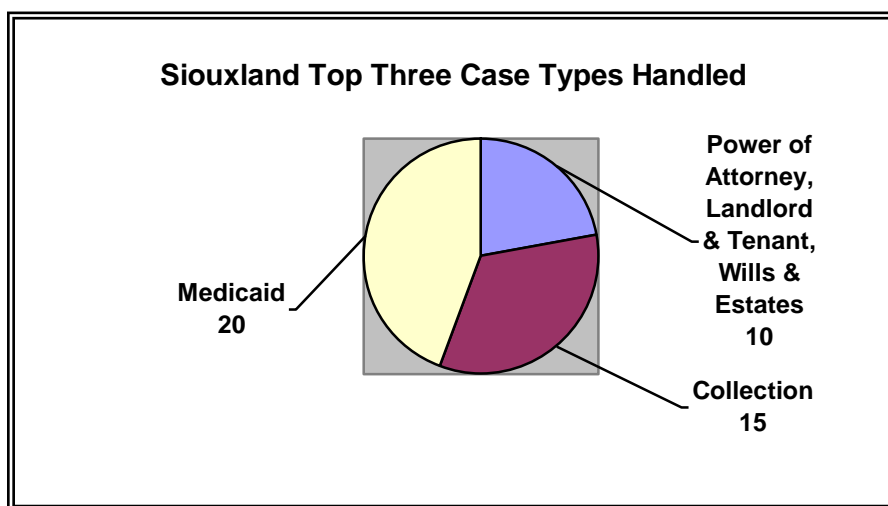
Units of Service 205

Unduplicated Clients Served 107

**Siouxland Aging Services, Inc.**

Units of Service 212

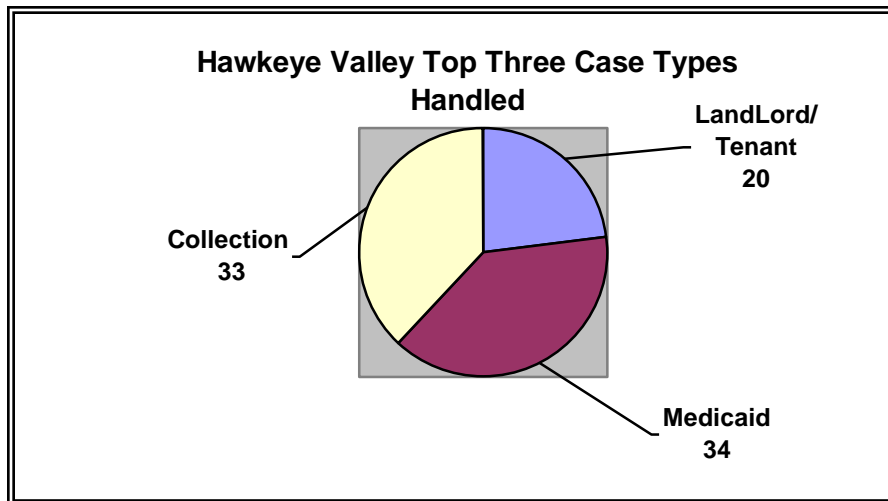
Unduplicated Clients Served 162



### Hawkeye Valley Area Agency on Aging

Units of Service 443

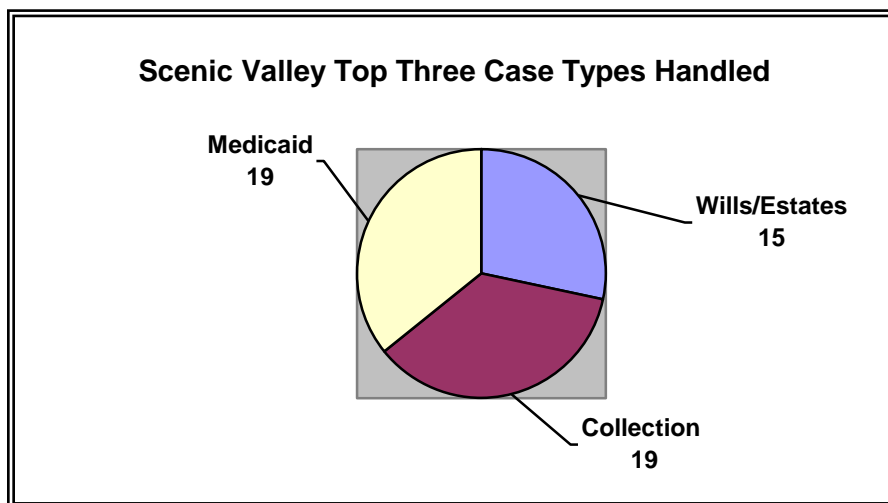
Unduplicated Clients Served 305



### Scenic Valley Area Agency on Aging

Units of Service 226

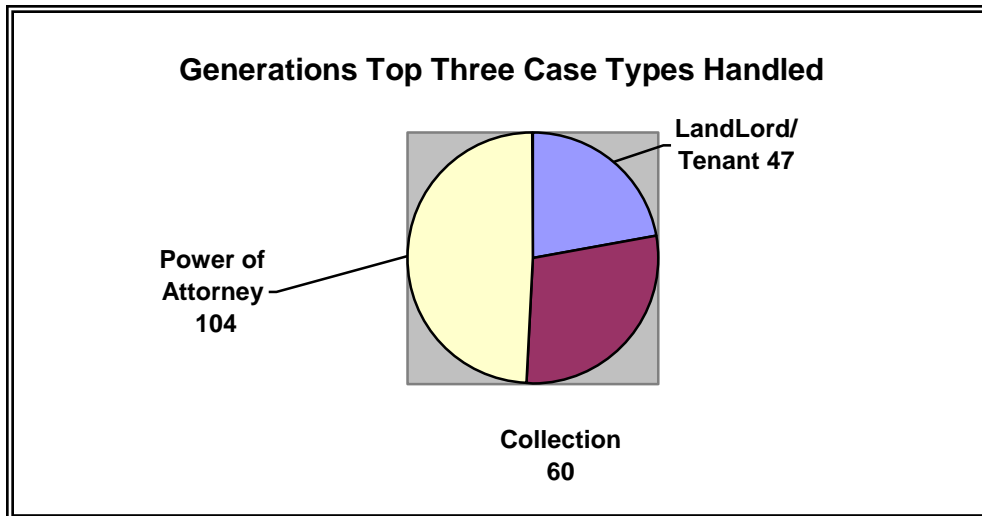
Unduplicated Clients Served 133



## Generations Area Agency on Aging

Units of Service 1,010

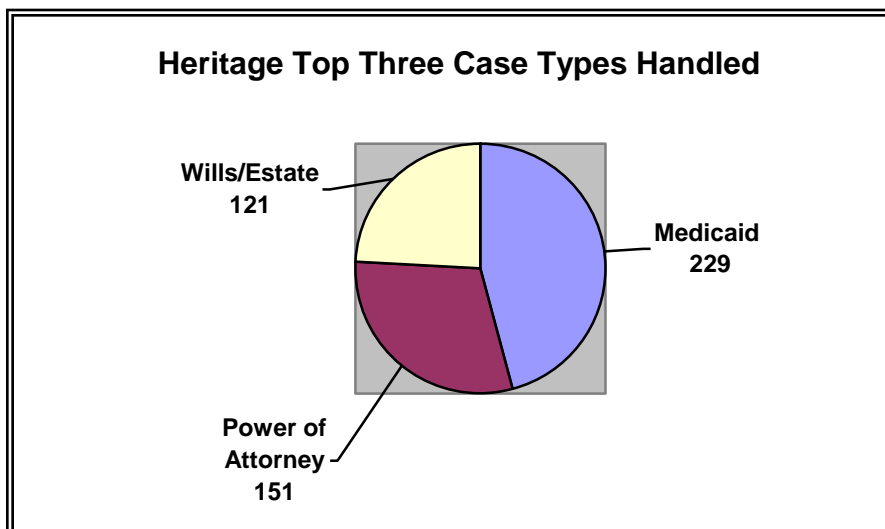
Unduplicated Clients Served 325



## The Heritage Agency

Units of Service 711

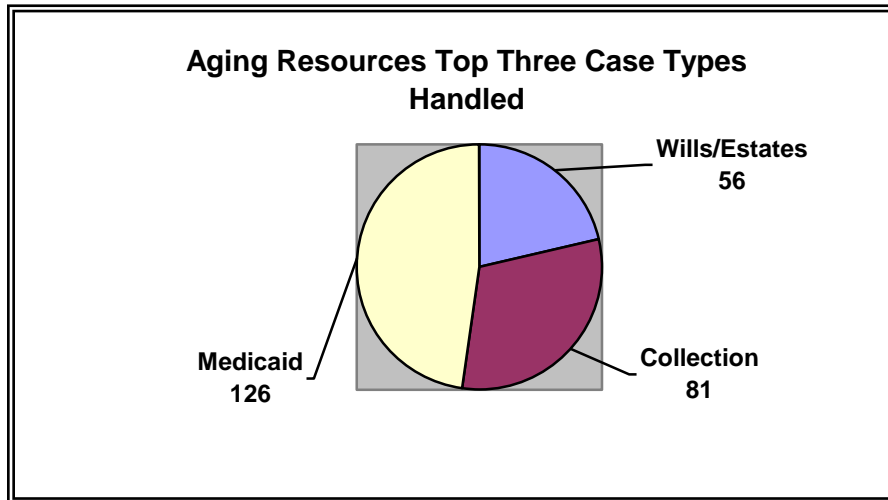
Unduplicated Clients Served 495



## Aging Resources of Central Iowa

Units of Service 1,229

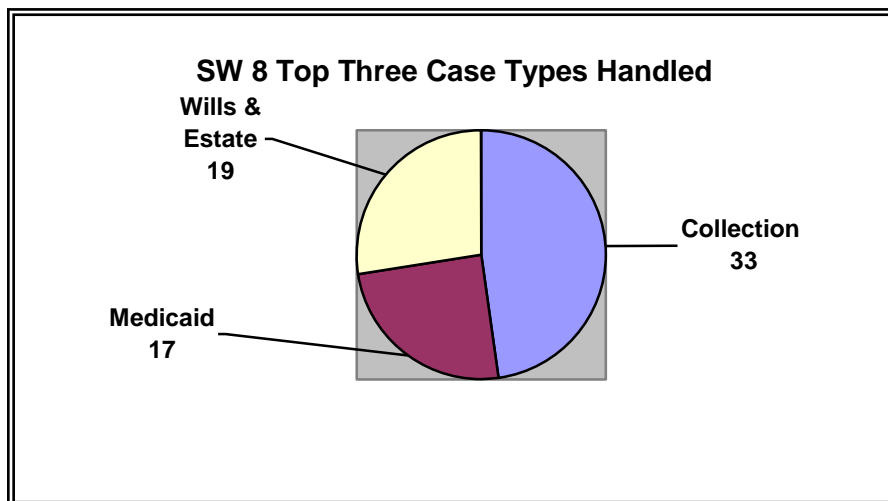
Unduplicated Clients Served 791



## Southwest 8 Senior Services, Inc.

Units of Service 368

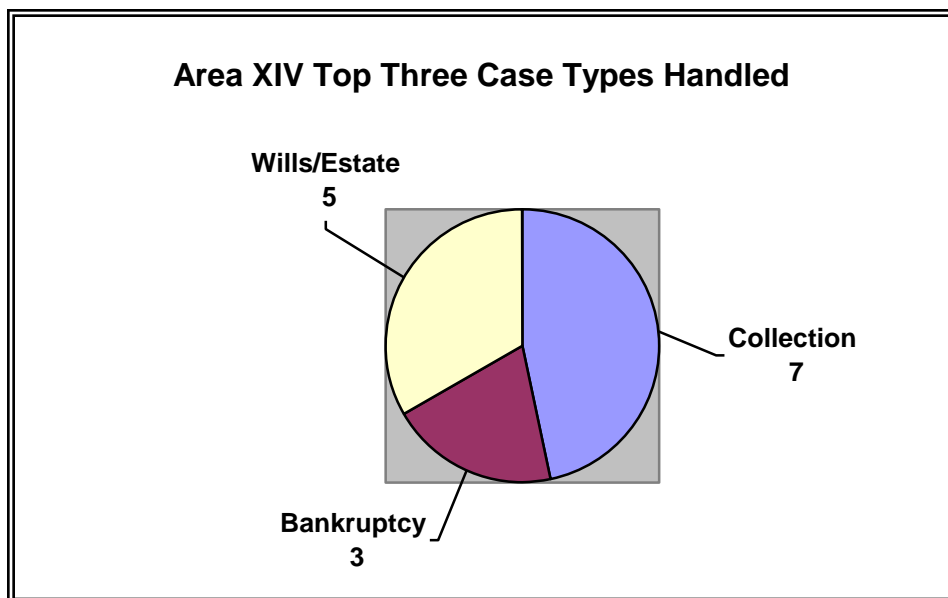
Unduplicated Clients Served 226



**Area XIV Agency on Aging**

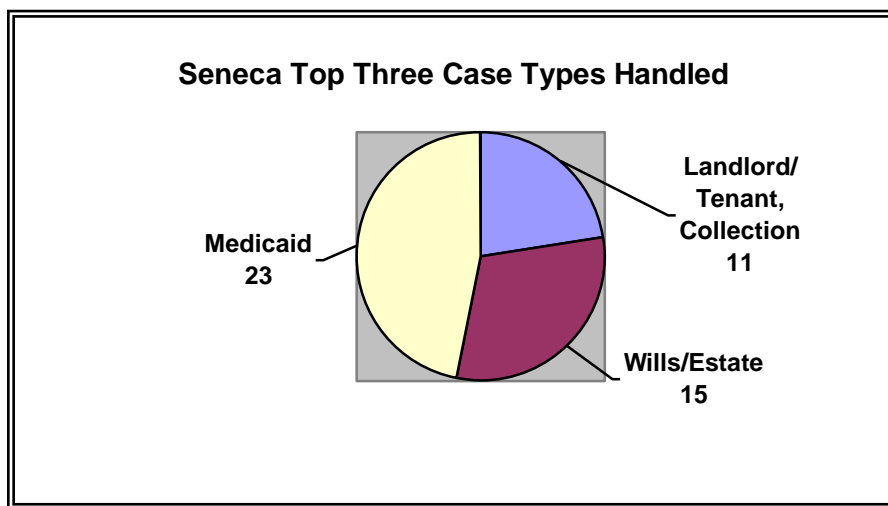
Units of Service 232

Unduplicated Clients Served 67

**Seneca Area Agency on Aging**

Units of Service 237

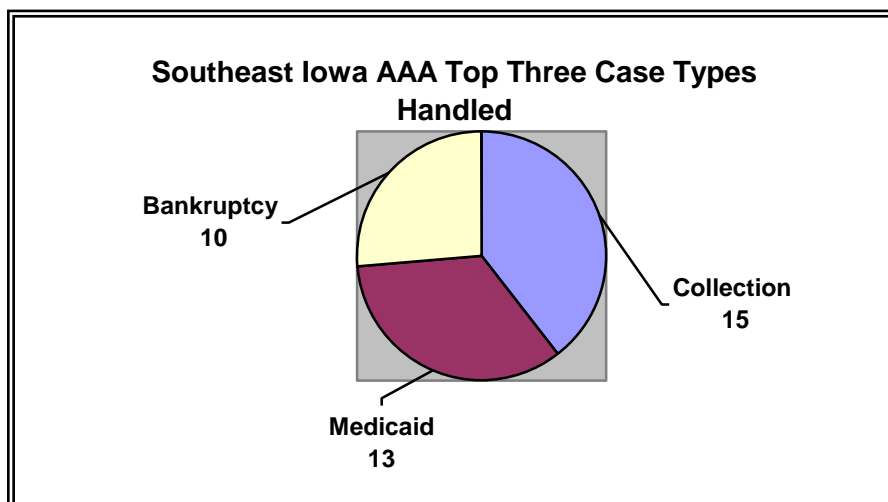
Unduplicated Clients Served 188



## **Southeast Iowa Area Agency on Aging, Inc.**

Units of Service 275

Unduplicated Clients Served 131



## **Statewide Totals**

Units of Service 5,834

Unduplicated Clients Served 3,330

**CONCLUSION:**

The Title IIIB Legal Assistance Program provides a valuable service to older Iowans in need of legal assistance and information. The program served 3,330 clients and provided 5,834 hours of service to persons 60 and older. Of the 3,330 clients served, 2,260 were in economic or social need, while 297 were minorities. Older Iowans most generally seek assistance from the legal program for issues such as Medicaid eligibility and information, debt collection concerns, Bankruptcy, Contracts, Landlord/Tenant, Powers of Attorney (POA), Wills and Estate concerns. An additional 1,220 older Iowans received information and assistance by attending community legal education forums presented by the Legal Assistance Program providers.

The statistics also show that even though 3,330 individuals were served, there were another 542 older Iowans with unmet needs for legal assistance. These 542 individuals needed 1,846 hours of service. The need for this legal assistance could not be addressed by the legal providers and aging network due to inadequate funding availability.

The Iowa Legal Assistance Program provides an array of services to meet the legal needs of older Iowans. The program:

- (1) Educates about the law and how it applies;
- (2) Helps prevent legal problems and provides appropriate referrals;
- (3) Provides information to allow individuals to self-advocate; and
- (4) Assists with direct legal representation, counsel and advice, when necessary